



Tom Palmer, NetSuite Functional Consultant

NetSuite Consultant, experienced with front end functional work. Knowledge of Workflows, Approval Processes, Integrations and Custom Records.

Email: tpalmer@painted-red.co.uk

Project Experience

Klaviyo Integration

NetSuite Functional Consultant

Buster and Punch use a mailing system, Klaviyo. Previously this system was disjointed from NetSuite creating multiple data sources for customer contact information and un-accurate unsubscribe information. As part of the process to correct this, I used Celigo Integrator.io to connect contact information from NetSuite to Klaviyo, unifying the location of data. Key deliverables included:

- Creating a scope for the project
- Closely working with marketing and E-com teams
- Integration of NetSuite, Integrator.io and Klaviyo
- Liaising with Klaviyo to troubleshoot the integration
- Full end to end testing of the integration and solution
- Creating user guides, training materials and conducting End User Training

User License Management

NetSuite Functional Consultant

Platinum Stairlifts lack of visibility over current users and their licenses meant there was a requirement for a feature in NetSuite to easily display and react to users current license types and last logon dates. This was achieved with multiple custom fields on the employee record, a few saved searches, 2 workflows and Suite Analytics to create a visually pleasing, data rich dashboard which would identify stale users and unutilized licenses. Key deliverables included:

- Creating a scope and visualizations for the project
- Closely working with IT teams
- Full testing of the solution
- Obtaining feedback and visual improvements ideas
- Creating user guides, training materials and conducting End User Training

Vend EPOS Solution

NetSuite Functional Consultant

As part of Buster and Punch' continuous improvement to the employee and customer experience, a new system was requested which would simplify and speed up in-store customer sales and returns. Key deliverables included:

- Creating a scope and flow diagram for the project
- Closely working with Showroom and sales teams
- Integration of Vend and NetSuite
- Liaising with In8Sync to setup and configure the integration
- Full end to end testing of the integration and solution
- Obtaining and configuring end user hardware
- Creating user guides, training materials and conducting End User Training

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- Providing post go-live support to multiple showrooms

Automated Work Orders & Item Fulfillments

Systems Support Technician

As part of Platinum Stairlifts' improvement to the manufacturing process, a new process was requested which would automate creation of "to-stock" work orders and automate the completion of Sales Order linked Work Orders. Key deliverables included:

- Creating a scope and flow diagram for the project
- Closely working with Production and Planning teams
- Creation of a workflow and custom dashboards
- Liaising with Catalyst IT for scripting sections to this solution
- Creating user guides, training materials and conducting End User Training

NetSuite Engineering Change Management Solution

Systems Support Technician

Platinum Stairlifts requested a new feature within their current NetSuite account which could handle Engineering changes, to make tracking of "ECNs" via the UI easier and more manageable. Project scoped in early January 2022, by the end of February the solution was created, UAT undertaken, End User Training delivered and deployment into the Production environment complete. Key deliverables included:

- Creating a scope for the project from customer requirements
- Closely working with Engineering teams
- Working with the wider ECN team for UAT and User Training
- Working with Continuous Improvements team to test all the different components of the solution
- Eventual deployment of workflow, custom records and custom dashboards into customer production account
- Providing post go-live technical support and user assistance

Customer Portal Integration

Systems Support Technician

A customer portal was being developed externally for Platinum Stairlifts, this was designed to integrate with NetSuite and push customer sales orders from the portal to NetSuite. Key deliverables included:

- Understanding the external portal and the requirements to integrate with NetSuite
- Reconfiguring customer price levels and price lists
- Working closely with True 9 to assist with the development of the portal ensuring it would meet the requirements of the business
- Creating full end to end flow diagrams to help in documenting the processes of a sales order throughout the business
- Full knowledge transfer to the Technology Support Team

Purchase Requisition Feature

Systems Support Technician

Platinum Stairlifts wanted to replace an existing, paper based Purchase Requisition procedure. NetSuite was chosen as Purchase Requisitions could then be automatically converted to Purchase Orders. Key deliverables included:

- Liaising with Catalyst IT and understanding the existing scope and process
- Compiling an up to date list of feature requests and requirements from Purchasing and Finance to then create a priority/business value list
- Creating specifications for each requirement
- Using records to create an approval matrix and control the approval process of Purchase Requisitions
- Creating Saved Searches, Dashboards, User Guides and custom forms
- Testing enhancements
- Conducting UAT
- Deployment into the Production environment.

Stock & Bins Replenishment

Systems Support Technician

A process was required for NetSuite to automate the request of stock from the warehouse for the manufacturing lines on an order and semi-automate the fulfillment of those lines. A prerequisite was to update all inventory items with preferred bins in the manufacturing and warehouse locations, preferred stock levels and replenishment points. Key deliverables included:

- Developing a scope with multiple departments including, Purchasing, Warehouse, Continuous Improvement and MP&L
- Working closely with Continuous Improvement department along with the stock demand planner
- Structuring and validating the updated data before performing the import
- Creating saved searches and dashboards
- Thoroughly testing the end to end solution
- Preparing user guides and delivering End User Training

Overhaul Product Line BOMs

Systems Support Technician

Platinum Stairlifts had a requirement for NetSuite to automate work orders and item fulfillments. Before this could be developed, the BOM structure for their 3 product lines needed updating and validating. Key deliverables included:

- Liaising with R&D department and understanding the business requirements
- Creating an "importable" version of the BOMs within Excel
- Creating a new product in Verenia CPQ to use the new BOM structure
- Managing the entire process, liaising multiple departments for approval of the new BOM structure
- Importing the final BOM version into Sandbox, creating test plan and thoroughly testing
- Owning a data validation session with key stakeholders to ensure the data was correct for the future use in automated work orders
- Deployment into the Production environment
- Providing post go-live technical support

Customs Invoice Solution

Systems Support Technician

Due to Brexit, changes to the import/export requirements impacted Platinum Stairlifts. This meant that a solution was required to consolidate multiple Sales Orders on to one Customs Invoice. Key deliverables included:

- Understanding customs requirements and existing documentation
- Gathering user requirements and creating Technical Specification
- Working from Technical Specification and using custom forms, custom records and advanced html/pdf templates to create a custom screen to allow the selection of the relevant orders, input of shipment details and creation of a customs invoice with its own record number and printable PDF
- Conducting UAT
- Deploying to Production environment

Estimate Approval Process

Systems Support Technician

The amount of time spent by Platinum Stairlifts' CAD department on each drawing was below par, this was due to manual processes. A solution was required to allow the upload of the PDF drawings which would then be automatically emailed to the customer for approval. Key deliverables included:

- Contacting and liaising with Catalyst IT, scripting part of the process
- Preparing training material, managing internal shared document resources
- Creation of test plan and thoroughly testing the full end to end process
- Assisting with deployment to the Production environment
- Additional testing in Production prior to going live

Spare Parts Solution

Systems Support Technician

Platinum Stairlifts required control around their spare parts list and what items should become a spare. In addition, they needed a dynamically created PDF catalogue of all the spare parts, with descriptions and prices (applying relevant currency / price level per customer). Key deliverables included:

- Understanding requirements from multiple stakeholders
- Using workflows, custom forms, custom fields, saved searches and advanced html/pdf templates
- Creation of user guides and training material for multiple departments
- Conducting internal functional testing
- Assisting with UAT and End User Training
- Deployment of final solution into Production environment
- Post go-live support